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AUTHOR Halverson, Don E.
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ABSTRACT

This booklet suggests ways to conduct meetings more effectively and to the mutual satisfaction of the participants and the chairperson. The publication differentiates among several types of meetings and delineates how each should be conducted. Suggestions are made concerning attention to content and process, roles of participants, agenda development, minutes, facilities, and evaluation. Helpful procedures are suggested, and a section on decision-making styles is included. The appendix contains a questionnaire that can be used to evaluate meeting effectiveness. (Author/JM)

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effective meeting management

by

Don E. Halverson, Ed.D.
Assistant Superintendent
Educational Support & Planning

San Mateo County Office of Education
J. Russell Kent, Superintendent of Schools
333 Main Street, Redwood City, CA 94063

EA 011 956

SEPTEMBER, 1977

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TEN COMMANDMENTS

For Meeting Goers and Callers

The following commandments were set forth in a newsletter of Xerox Managers:

1. *Thou shalt not meet if the matter can be resolved by other means.*
2. *Thou shalt make the purpose of each meeting known to those thou summonest.*
3. *Thou shalt summon only those whose presence is needful.*
4. *Thou shalt start at the time announced.*
5. *Thou shalt stop when it is meet and right to do so.*
6. *Thou shalt not run beyond.*
7. *Thou shouldest combine into one those which need not be separate.*
8. *Prepare thy thoughts that the minutes might not be wasted.*
9. *Schedule not in haste, for the day is short in which to do that which thou hast to do.*
10. *Fear not to cancel if need appears.*

SELECTED QUOTES ON MEETINGS

"There are a number of common symptoms of poor organization which usually require no further diagnosis. There is, first, the symptom of too many meetings attended by too many people."

PETER DRUCKER

"The effective man always states at the outset of a meeting the specific purpose and contribution it is to achieve. He makes sure that the meeting addresses itself to this purpose. He does not allow a meeting called to inform to degenerate into a 'bull session' in which everyone has bright ideas. But a meeting called by him to stimulate thinking and ideas also does not become simply a presentation on the part of one of the members, but is run to challenge and stimulate everybody in the room. He always, at the end of his meetings, goes back to the opening statement and relates the final conclusions to the original intent."

PETER DRUCKER

"Plan to solve a problem - not to hold a meeting."

YOUNG PRESIDENTS' ORGANIZATION

FOREWORD

THE PURPOSES AND PROCEDURES FOR CALLING AND CONDUCTING AN EFFECTIVE MEETING ARE RELATIVELY SIMPLE:

1. THE MEETING WILL ACHIEVE SOME OBJECTIVE OR FULFILL SOME PERFORMANCE CRITERION THAT NO OTHER DEVICE OR PROCEDURE MIGHT OTHERWISE ACHIEVE WITH EQUAL EFFECTIVENESS.
2. THE TYPE OF MEETING SHOULD BE BASED UPON THE OBJECTIVE TO BE ATTAINED; E.G., PROBLEM SOLVING, PLANNING, DECISION MAKING, INFORMATION SHARING.
3. THE MEETING LOCATION, FURNITURE ARRANGEMENT, PROCEDURE, AGENDA AND COMMUNICATION PRIOR AND SUBSEQUENT TO THE MEETING ARE BASED UPON THE TYPE OF MEETING TO BE HELD.

THIS BOOKLET HAS BEEN DEVELOPED FOR THE PURPOSE OF SUGGESTING WAYS TO SET FORTH AND ACHIEVE MEETING OBJECTIVES EFFECTIVELY; THAT IS, TO THE MUTUAL SATISFACTION OF THE PARTICIPANTS AND THE CHAIRPERSON.

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I. TYPES OF MEETINGS

BEFORE A MEETING IS CALLED, THE OBJECTIVE MUST BE DETERMINED. A WELL THOUGHT-THROUGH OBJECTIVE MIGHT SUGGEST A PROCEDURE OTHER THAN A MEETING, SUCH AS A CONFERENCE TELEPHONE CALL, A MEMO, AN ARTICLE IN THE ORGANIZATION BULLETIN OR SOME OTHER SUCH DEVICE. CHANCES ARE THAT ANY OF THE FOREGOING WOULD BE CONSIDERABLY LESS EXPENSIVE THAN HOLDING A MEETING. THERE MUST BE SOME OVERRIDING REASONS THEREFORE WHICH SUGGEST THAT A MEETING IS THE "BEST" PROCEDURE FOR ACCOMPLISHING WHATEVER NEEDS TO BE ACCOMPLISHED. SUCH REASONS MIGHT BE:

- WHEN YOU MUST BE SURE YOUR MESSAGE WILL BE UNDERSTOOD. MOST MANAGERS HAVE EXPERIMENTED RATHER WIDELY WITH WRITTEN COMMUNICATIONS AND ARE AWARE OF THE LIMITATIONS OF THIS ONE-WAY METHOD. A MEETING PROVIDES THE OPPORTUNITY FOR DIRECT FEEDBACK, THUS ASSURING THE ACCURACY OF THE INFORMATION RECEIVED.
- WHEN YOU WANT TO GET SUBORDINATES' REACTIONS AND STIMULATE TWO-WAY COMMUNICATIONS. ALONE, A SUBORDINATE MIGHT TELL YOU WHAT HE OR SHE THINKS YOU WANT TO HEAR. IN A MEETING WITH SUPPORT FROM OTHERS, YOU ARE MORE APT TO GET THE FACTS.
- WHEN YOU NEED MORE FACTS OR EXPERT OPINIONS. AS THESE ARE GENERATED THEY SPARK ADDITIONAL FACTS AND OPINIONS.
- WHEN YOU MUST DEPEND ON OTHERS TO CARRY OUT DECISIONS. PEOPLE SUPPORT WHAT THEY HELP DEVELOP.
- WHEN YOU WANT TO BUILD BETTER TEAMWORK. DON'T RESTRICT MEETINGS TO PROBLEM SESSIONS. MEMBERS NEED TO FEEL THEY HAVE A PART IN THE DEVELOPMENT AND GROWTH OF THEIR ORGANIZATION.

A MEETING IS NOT A MEETING IS NOT A MEETING. TYPES OF MEETINGS AND THE OBJECTIVES THEY ARE BEST EQUIPPED TO ACCOMPLISH CAN BE SET FORTH AS FOLLOWS:

TYPES OF MEETINGS	OBJECTIVES	PROCEDURE
1. TASK-ORIENTED MEETINGS:		
A. PLANNING	TO DEVELOP A PLAN AS A GROUP AND TO OBTAIN CONSENSUS ABOUT IT.	GROUP FACILITATOR AND RECORDER
B. PROBLEM-SOLVING	TO DEFINE, ANALYZE, AND SELECT A SOLUTION AMONG ALTERNATIVES.	GROUP FACILITATOR AND RECORDER
C. DECISION-MAKING	TO ARRIVE AT A GROUP DECISION OR A GROUP RECOMMENDATION.	GROUP FACILITATOR AND RECORDER
D. DATA GATHERING	TO OBTAIN INFORMATION, OPINIONS OR CONSENSUS.	GROUP FACILITATOR AND RECORDER
E. BRAIN STORMING	TO GENERATE A MULTITUDE OF ALTERNATIVES FOR LATER ANALYSIS AND SELECTION.	GROUP FACILITATOR AND RECORDER
2. INFORMATION GIVING OR TRAINING SESSIONS	TO DISSEMINATE "THE WORD" OR EXPLAIN A PROCESS OR PROCEDURE. THIS MAY BE ONE-WAY OR TWO-WAY COMMUNICATION.	CHAIRPERSON UNLESS IT IS MORE RECEIVING THAN GIVING INFORMATION IN WHICH CASE A FACILITATOR IS PROBABLY MORE APPROPRIATE
3. RAP SESSIONS (T-GROUP, ENCOUNTER, ETC.)	TO SURFACE FEELINGS AND ATTITUDES AND DEAL WITH THESE FEELINGS AND ATTITUDES IN A CONSTRUCTIVE MANNER.	LEADER

A SINGLE MEETING MAY ENCOMPASS SEVERAL OF THOSE OBJECTIVES; THEREFORE THE PROCEDURE MAY VARY AT DIFFERENT TIMES DURING THE MEETING ACCORDING TO THAT WHICH IS TO BE ACCOMPLISHED.

II. GENERAL SUGGESTIONS FOR TASK-ORIENTED AND INFORMATION-GIVING MEETINGS

A. PLANNING THE MEETING:

1. MAKE CERTAIN MEETING IS NECESSARY. (WILL A MEMO DO AS WELL FOR THE INFORMATION, ETC.?)
2. SET MEETING OBJECTIVES AT THE OUTSET. (WHAT IS THE MEETING DESIGNED TO ACCOMPLISH?)
3. SELECT PARTICIPANTS ON BASIS OF OBJECTIVES TO BE ACCOMPLISHED. (CAN HE/SHE CONTRIBUTE TO THE PLANNING?)
4. MAKE MEETING ARRANGEMENTS, LOCATION, TIME, EQUIPMENT, MATERIALS, ETC. (WHAT IS BEST TIME TO HAVE MEETING AND WHAT ARE OPTIMAL FACILITIES, ETC.?)
5. DETERMINE PROCEDURES FOR THE MEETING. (NEED FACILITATOR/ RECORDER OR CHAIRPERSON, ETC.?)
6. DECIDE AT THE OUTSET WHAT PRIORITY THE MEETING HAS IN RELATION TO OTHER REQUIREMENTS OF THE ORGANIZATION.
7. OBTAIN INPUT TO THE AGENDA AND DISTRIBUTE BEFORE MEETING DATE SO PARTICIPANTS CAN REVIEW THE NECESSARY DATA BEFORE THE MEETING.

B. DURING THE MEETING:

1. BEGIN ON TIME.
2. PRIORITIZE AGENDA ITEMS AND ALLOT TIME TO EACH ITEM. AT END OF STATED TIME EITHER POSTPONE LOWER-PRIORITY ITEMS OR SET ANOTHER TIME TO COMPLETE THE AGENDA ITEMS WHICH NEED MORE TIME.
3. ENCOURAGE ACTIVE PARTICIPATION FROM EVERYONE - RESTRICT DOMINANT PERSONALITIES.
4. SENSE THE GROUP AS YOU PROCEED: E.G., GET FEEDBACK AND GIVE PLAYBACK AS APPROPRIATE. (REMEMBER CONTENT AND PROCESS SUGGESTIONS)
5. TRY TO ATTAIN OBJECTIVES BY CONSENSUS.(SEE SECTION ON DECISION-MAKING)
6. COME TO CLOSURE ON EACH AGENDA ITEM BY STATING THE OUTCOME, NEXT STEP, WHO WILL DO WHAT - WHEN, ETC.
7. EVALUATE MEETING. (IF ON-GOING TYPE OF MEETINGS, SET MEETING EVALUATION AS AN AGENDA ITEM.)
8. END ON TIME.

C. AFTER THE MEETING:

1. COMPLETE AND DISTRIBUTE MINUTES OR MEETING NOTES AS AN ON-GOING RECORD.
2. REVIEW EVALUATIONS AND PLAN FOR NEXT MEETING.

III. SPECIAL FUNCTIONS OF ONGOING ORGANIZATIONAL MEETINGS

MANAGEMENT MEETINGS, FACULTY MEETINGS, TEAM MEETINGS, CABINET OR COUNCIL MEETINGS ARE EXAMPLES OF ONGOING ORGANIZATIONAL MEETINGS. SUCH MEETINGS PERFORM SEVERAL ESSENTIAL FUNCTIONS IN AN ORGANIZATION. SOME OF THESE ARE AS FOLLOWS:

- GROUP MEETINGS PROVIDE FOR A GROUP IDENTIFICATION; A COLLECTIVE IDENTITY. THEY PROVIDE A SENSE OF BELONGING AS A GROUP. AT THE SAME TIME THEY PROVIDE A SENSE OF EXCLUSION TO THOSE NOT MEMBERS OF THE GROUP.
- THROUGH ITS MEETINGS THE GROUP REDEFINES ITS PURPOSES, CULTURE AND NORMS. IT ALSO DEVELOPS A CORE OF INFORMATION, ATTITUDES, AND EXPERIENCES WHICH IT SHARES AS A GROUP.
- REGULAR MEETINGS PROVIDE AN OPPORTUNITY AND A FORUM FOR COMMUNICATING THE GOALS AND PURPOSES OF THE ORGANIZATION AND IDENTIFYING THE VARIOUS ROLES OF GROUP MEMBERS IN ACHIEVING THESE GOALS AND PURPOSES.
- AS PARTICIPANTS IN GROUP MEETINGS, A SENSE OF COMMITMENT TO THE ORGANIZATION IS ACHIEVED AS WELL AS OWNERSHIP AND COMMITMENT TO DECISIONS MADE IN SUCH MEETINGS.
- GROUP MEETINGS FOSTER TEAMNESS. LEADERS CAN BE PERCEIVED AS TEAM MEMBERS AND NOT AS ALOOF "OFFICIALS".
- GROUP MEETINGS PROVIDE FOR A REIDENTIFICATION OF RELATIVE STATUS TO ALL GROUP MEMBERS. IN A SENSE GROUP MEMBERS REAFFIRM THEIR POSITIONS IN THE "PECKING ORDER".

To gain the most from these functions, group meetings should be held about twice a month. More often might usurp too much time from each participant and therefore be seen as an impediment to getting the job done. Less often does not provide the immediacy needed to utilize the meetings as communication and problem-solving devices. Participants then turn to other organizational structures or avenues and the meetings lose their productivity.

IV. CONTENT AND PROCESS *

CONTENT:

THE TASK TO BE ACCOMPLISHED. THE CONTENT IS DETERMINED BY THE GOALS AND OBJECTIVES OF THE ORGANIZATION OR GROUP. WORK GROUPS EXIST TO ACCOMPLISH OBJECTIVES THROUGH TASKS. EXAMPLES OF CONTENT AREAS:

- DEVELOPING MASTER PLANS AND PLANNING NEED ASSESSMENTS.
- CONDUCTING LONG-RANGE STUDIES.
- DESIGNING AND IMPLEMENTING PLANS FOR REORGANIZATION OR DECENTRALIZATION.
- DEFINING EFFECTIVENESS AREAS.
- DEFINING ORGANIZATION GOALS AND OBJECTIVES.
- DEVELOPING AND IMPLEMENTING BUDGETING AND DATA PROCESSING SYSTEMS.
- CONDUCTING STAFF DEVELOPMENT (INSERVICE) TRAINING PROGRAMS.
- CONDUCTING STAFF AND MANAGEMENT MEETINGS.
- COMMUNICATING INFORMATION TO PERSONNEL.
- CONDUCTING A BOND OR TAX CAMPAIGN.
- HOLDING A COMMUNITY MEETING.
- PLANNING PROJECTS.
- MAKING ASSIGNMENTS.
- DEVELOPING AND IMPLEMENTING A PUBLIC RELATIONS CAMPAIGN.
- EVALUATING SCHOOL DISTRICT PROGRAMS.
- CONDUCTING TEACHER CONTRACT NEGOTIATIONS.

PROCESS:

WHAT HAPPENS WITHIN AND BETWEEN PEOPLE AS THEY WORK ON THEIR TASKS?

EXAMPLES OF PROCESS:

- APPREHENSION TOWARDS BEING OPEN ABOUT PERSONAL FEELINGS AND OPINIONS.
- RESENTMENT AT BEING MANIPULATED.
- IRRITATION AT GROUP MEMBERS FOR NOT LISTENING OR BEING EMPATHETIC.
- RESENTMENT AT NOT BEING ALLOWED TO PARTICIPATE IN DECISION-MAKING.
- ANGER AND CONFLICT BETWEEN GROUP MEMBERS BECAUSE OF LACK OF CONCERN FOR EACH OTHER'S NEEDS.
- IRRITATION BECAUSE ONE PERSON IS DOMINATING THE GROUP.
- APATHY AND INDIFFERENCE BECAUSE OF IRRELEVANCE OF TASK TO PERSONAL NEEDS.
- ANGER BECAUSE OPINIONS ARE NOT OBJECTIVELY EXPLORED BY THE GROUP.
- ANGER BECAUSE OF BEING ASKED TO MEET ANOTHER PERSON'S RESPONSIBILITIES.
- BORED BECAUSE TOO MUCH TIME IS BEING SPENT ON A PARTICULAR SUBJECT, ESPECIALLY A SUBJECT VIEWED AS IRRELEVANT.
- UNCOMFORTABLE BECAUSE OF MEETING ENVIRONMENT (TEMPERATURE, LIGHTING, LENGTH OF MEETING).
- CONFUSED BECAUSE OF UNCLEAR AGENDA.
- WARMTH AND APPRECIATION TOWARDS GROUP MEMBERS BECAUSE OF THEIR SUPPORTIVENESS.
- SATISFACTION FROM BEING PRODUCTIVE IN ACCOMPLISHING GROUP TASKS.

* *Adapted from material developed by: CENTER FOR EDUCATIONAL LEADERSHIP, Los Angeles, CA, 1974*

Attention must be paid to both content and process elements of a meeting. Attention to content only may result in angry or upset participants who may take negative or dysfunctional actions, thus ultimately sabotaging the task. Attention to process only may provide that "warm" feeling but nothing else will be accomplished; that is, the objectives will not be met.

V. GENERAL ROLES OF MEETING PARTICIPANTS

PARTICIPANTS (OTHER THAN LEADERS, FACILITATORS, ETC.):

- READ THE MINUTES OF THE PREVIOUS MEETING BEFORE ATTENDING.
- ARRIVE ON TIME.
- BRING MATERIALS NEEDED.
- ACTIVELY PARTICIPATE.
- KEEP TO THE AGENDA AND THE ALLOTTED TIME.
- EXERT PEER PRESSURE ON OTHER GROUP MEMBERS TO CONTROL EXCESSIVE TALKERS, ETC.
- PROTECT THE RIGHTS OF THOSE WITH MINORITY POINTS OF VIEW.
- ASSIST THE FACILITATOR, RECORDER, LEADERS, OR CHAIRPERSON TO KEEP TO THEIR ASSIGNED ROLES.
- ASK CLARIFYING QUESTIONS WHEN THERE APPEARS TO BE DOUBT.
- OFFER PROCESS SUGGESTIONS AS WELL AS TASK SUGGESTIONS.
- AFTER THE MEETING, CARRY OUT COMMITMENTS.
- KEEP CONFIDENTIALITY OF MEETINGS WHEN AGREED TO.

(IF THE MEETING IS UNSUCCESSFUL, IT IS AS MUCH THE "FAULT" OF THE GROUP MEMBERS AS ANYONE ELSE.)

LEADERS:

- SET THE CLIMATE AS ACCEPTING, NON-JUDGMENTAL.
- PROTECT INDIVIDUALS FROM THE GROUP IF NECESSARY.
- PROVIDE OPPORTUNITIES FOR EVERY MEMBER TO ACTIVELY PARTICIPATE AS HE/SHE SO DESIRES.
- CONDUCT THE MEETING.

CHAIRPERSONS:

- CONDUCT THE MEETING.
- SET THE AGENDA.
- BEGIN AND END ON TIME.
- SCHEDULE ADDITIONAL MEETINGS IF NECESSARY.
- PROVIDE FOR EVALUATION.

FACILITATORS:

- HELP THE GROUP SOLVE THE PROBLEM, DEVELOP THE PLAN, OR MAKE THE DECISION (DO NOT ADD OWN IDEAS).
- DEFEND PARTICIPANTS FROM THE GROUP IF NECESSARY.
- KEEP ATTENTION FOCUSED ON THE TASK AT HAND.
- PROVIDE FOR ACTIVE PARTICIPATION OF EACH MEMBER.
- OFFER PROBLEM-SOLVING SUGGESTIONS AS APPROPRIATE TO KEEP THE GROUP MOVING.
- OFFER PROCESS SUGGESTIONS AS APPROPRIATE.
- PROVIDE FOR FOLLOW-UP AS NECESSARY.

RECORDERS:

- RECORD BASIC IDEAS, PLANS, ETC. AS NECESSARY TO THE MEETING OBJECTIVE.
- RECORD LEGIBLY AND ACCURATELY.
- USE WORDS OF SPEAKER, IF POSSIBLE, RATHER THAN EDIT OR PARAPHRASE.
- REFER THE GROUP TO THE RECORD IF APPROPRIATE.
- PROVIDE FOR NECESSARY COMMUNICATION FOLLOW-THROUGH (COPIES TO EACH PARTICIPANT, ETC.)

ONE INDIVIDUAL MAY PERFORM IN DIFFERENT ROLES DURING A MEETING DEPENDING UPON THE OBJECTIVE TO BE ACCOMPLISHED. WHEN A PERSON'S ROLE IS CHANGED DURING THE MEETING, THERE SHOULD BE AN UNDERSTANDING AMONG THE PARTICIPANTS WHAT THE NEW ROLE IS, THUS AVOIDING ROLE CONFUSION.

RESEARCH FINDINGS IN PSYCHOLOGY AND EDUCATION

You retain within 24-hour period:

10% of what you get by reading only.
20% of what you get by ear.
30% of what you get by sight.
50% of what you get by ear and sight together.
70% of what you get by ear, sight and speaking.
90% of what you get by ear, sight, speaking and doing.

Do these percentages have any applications to effective meeting management?

VI. THE AGENDA

- THE AGENDA SHOULD REFLECT THE PURPOSES OR OBJECTIVES OF THE MEETING.
- PARTICIPANTS SHOULD HAVE INPUT TO THE AGENDA AS IT IS DEVELOPED WHENEVER POSSIBLE. THIS CAN BE ACHIEVED BY CIRCULATING A SKELETAL OR BLANK AGENDA AND ASKING FOR AGENDA ITEMS OR BY POSTING A LARGE SHEET OF BUTCHER PAPER PAPER ON THE WALL OF THE MEETING ROOM AND ASKING PARTICIPANTS TO ADD ITEMS AS APPROPRIATE.
- EACH ITEM ON THE AGENDA SHOULD HAVE A TIME SET; E.G., 10 MINUTES, 30 MINUTES, ETC.
- THE PARTICIPANT PLANNING THE ITEM ON THE AGENDA SHOULD BE IDENTIFIED AND SHOULD "INTRODUCE" THE ITEM AT THE MEETING.
- THE AGENDA SHOULD BE AVAILABLE TO EACH PARTICIPANT EARLY ENOUGH THAT PROPER PREPARATION CAN BE MADE FOR THE MEETING.
- THE RESULTS DESIRED SHOULD BE NOTED ON THE AGENDA; E.G., DECISION, DISCUSSION, PLAN, ETC.
- THE BEGINNING TIME AND ENDING TIME SHOULD BE STATED ON THE AGENDA.

SAMPLE AGENDA

ESP PROGRAM MANAGERS' MEETING
April 25, 1977
1:15 - 3:15 PM - Conference Room C

Agenda

	ITEM	PERSON RESPONSIBLE	RESULTS DESIRED	TIME
1.	Approval of Agenda	Earl Nielsen	Decision	5 minutes
2.	Master Calendar	Earl Nielsen	Information	5 minutes
3.	Funding Information	B. Batchelder	Information	10 minutes
4.	County Office Credential Requirements	D. Halverson	Discussion	10 minutes
5.	ESP Meeting Procedures	Earl Nielsen	Discussion	10 minutes
6.	ESP Brochure	Earl Nielsen	Information	10 minutes
7.	Items for Administrative Council/Cabinet	All	Decision	5 minutes
8.	Operations Update	Earl Nielsen	Discussion	30 minutes

SAMPLE TOOL FOR COLLECTING INFORMATION FOR AGENDA

WE ARE STARTING TO BUILD THE AGENDA FOR THE _____ MEETING FOR _____ PROGRAM MANAGERS. PLEASE SUBMIT ITEMS YOU WANT PLACED ON THE AGENDA AND INDICATE THE APPROXIMATE TIME YOU WILL NEED. REMEMBER! THE PURPOSES OF THE MEETING ARE:

1. TO PROVIDE AN OPPORTUNITY FOR PROGRAM MANAGERS TO SHARE INFORMATION WITH EACH OTHER.
2. TO KEEP THE DIVISION HEAD INFORMED.
3. TO PROVIDE AN OPPORTUNITY FOR INPUT TO PROPOSED POLICIES AND PROCEDURES.
4. TO HELP MAKE DECISIONS.
5. TO KEEP PROGRAM MANAGERS ABREAST OF OFFICE POLICIES, PROCEDURES, ETC.

LIST BELOW ITEMS RELATED TO THE ABOVE PURPOSES WHICH YOU WANT PLACED ON THE AGENDA:

	AGENDA ITEM	PERSON RESPONSIBLE	RESULTS DESIRED	TIME
1.				
2.				
3.				
4.				
5.				

PLEASE RETURN TO _____ NOT LATER THAN _____.

VII. THE MINUTES

- WHEN APPROPRIATE (PLANNING, PROBLEM-SOLVING, DECISION-MAKING, DATA GATHERING), WRITE ON BUTCHER PAPER TAPED TO THE WALL, OR LARGE PADS ON AN EASEL SO ALL PARTICIPANTS CAN SEE THE PROGRESS OF THE MEETING AS IT PROCEEDS. THE ADVANTAGES ARE NUMEROUS:

    A. PARTICIPANTS SEE THEIR IDEAS RECORDED AND DON'T FEEL THE NECESSITY TO KEEP BRINGING THEM UP BECAUSE OTHERS IN THE GROUP MAY HAVE FORGOTTEN THEM.

    B. IT SERVES AS A RECORD OF THE MEETING.

    C. IT SERVES TO DEPERSONALIZE THE IDEAS - THEY BECOME "THE GROUP'S".

    D. IT CAN BE TAKEN DOWN AND GIVEN TO A SECRETARY FOR VERBATIM MINUTES.

    CAUTION: U S E MASKING TAPE - NOT SCOTCH TAPE (doesn't take paint off the walls). USE WATER-BASED FELT TIP PENS (they don't bleed through onto the walls).

- THE MINUTES OF EACH MEETING SHOULD BE DISTRIBUTED TO ALL PARTICIPANTS WITHIN 48 HOURS OF THE MEETING.
- NOTES OF MEETING RESULTS CAN BE DISTRIBUTED TO OTHER INDIVIDUALS AND GROUPS AS A COMMUNICATION DEVICE.
- ONE SET OF MINUTES SHOULD BE PRESERVED AS AN OFFICIAL RECORD FOR REFERRAL AS NEEDED.
- IF MINUTES ARE TAKEN BY A MINUTE-TAKER WITH A NOTE PAD, THE FOLLOWING IS SUGGESTED:

    A. HAVE ONE PERSON EXTERNAL TO THE GROUP TAKE THE MINUTES (POSSIBLY A SECRETARY) - THIS REDUCES BIAS OR THE PERCEPTION OF BIAS.

- B. TRAIN THE MINUTE-TAKER IN HOW TO TAKE GOOD SUMMARY MINUTES; E.G., ACTIONS ONLY, NO QUOTES, FEW PERSONAL IDENTIFICATIONS, ETC.
- C. IF POSSIBLE AVOID SELECTING A MEMBER OF THE GROUP AS MINUTE-TAKER; THIS MEMBER BECOMES DISFRANCHISED AND CANNOT PARTICIPATE FULLY WITH THE GROUP.

ESP PROGRAM MANAGERS' MEETING

Minutes

April 25, 1977

1:15 - 3:15 PM - Conference Room C

PRESENT: Art Andresen (Tom Quinn)
Bobbie Batchelder
Mabel Bridges
Randall Cognetta
Don Halverson
Sally Logsdon
Frank Mattas
Curtis May
Glen McFate
Earl Nielsen
Sylvia Patterson (Tony Gonzales)

ABSENT: Jim Fee

APPROVAL OF AGENDA

The agenda was approved as read.

MASTER CALENDAR

May 2	- Public hearing on proposed Rules and Regulations, Title IX, 9:00-12 Noon, and 1:00 - 4:00 PM 450 Golden Gate Avenue, Rm 13450 San Francisco, CA
May 2-3	- Visitation of San Mateo County Schools by Salem, Oregon School Administrators. Tom Quinn and Frank Mattas are in charge of the visit.
May 6	- Workshop for classified personnel Vocational Education
May 9, 16, 23	- Follow-up for classified interpersonal communications - 2:30 - 5:00 PM
May 11	- Cultural Workshop 8:30-11:30 AM CTA Building, Diane Brooks

FUNDING INFORMATION

Bobbie Batchelder discussed Title IV, Part C Funding. Projects for some districts were funded and some were not. None was funded for the County Office.

COUNTY OFFICE CREDENTIAL REQUIREMENTS

Dr. Halverson related that the new Permissive Education Code does not apply to the County Office. Only coordinators we can hire are as specified in E.C. 885. At first indication it appears that most, if not all, coordinators may need to obtain an Administrative or Supervision Credential.

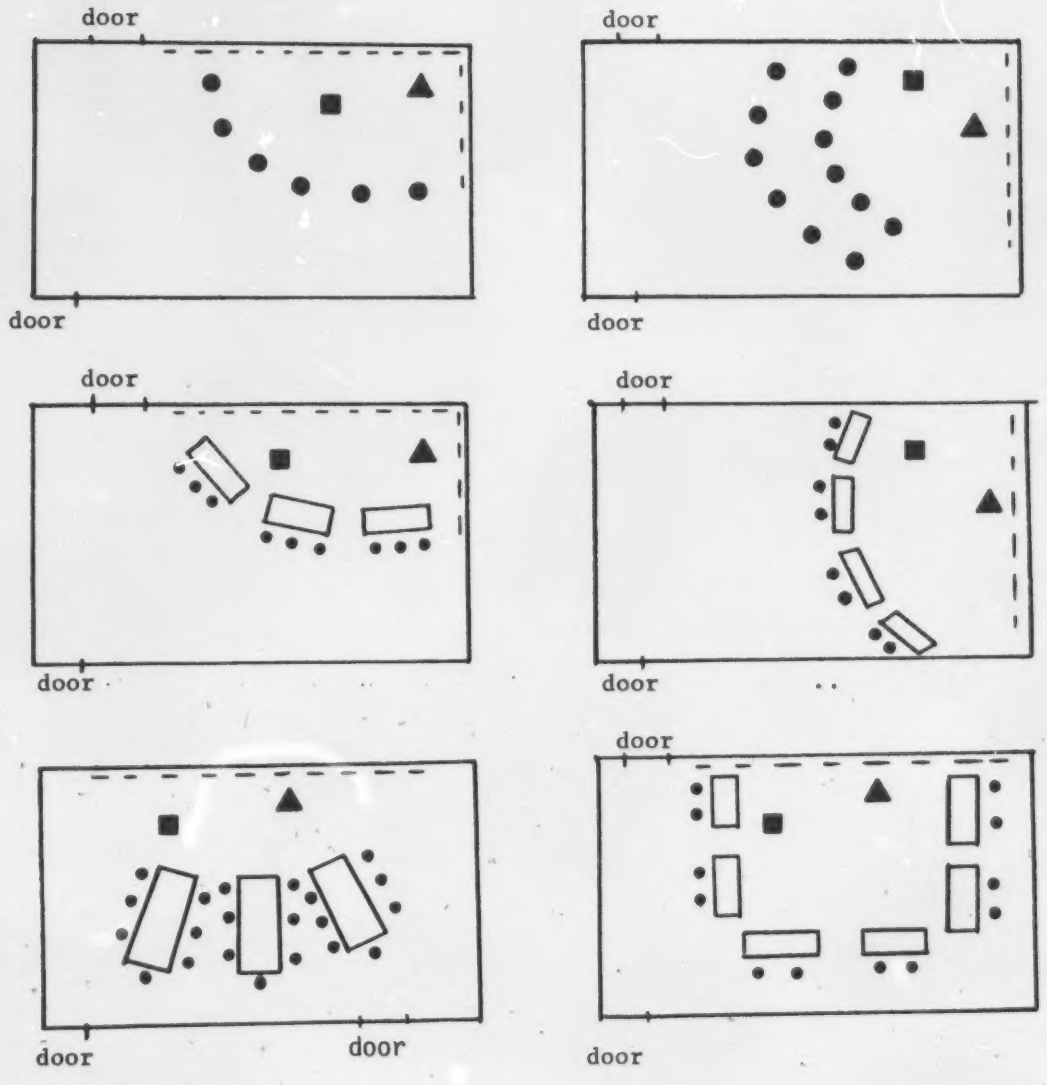
ESP MEETING PROCEDURES	Jim Fee's discussion was continued concerning rotating of Program Managers to run the Program Managers' meeting. The committee decided not to rotate.
ESP BROCHURE	Earl Nielsen stated that Dave Shepard will be doing another brochure on the County Office.
ITEMS FOR ADMINISTRATIVE COUNCIL/ CABINET	No comments.
OPERATIONS UPDATE	Dr. Cognetta stated that there would be 15 schools participating in the Laguna Salada Needs Assessment in September. May 4 - Inservice Committee. Dr. Halverson stated that a nutritionist from San Mateo County Heart Association is campaigning to reduce "junk" food in cafeteria and vending machines. Tom Quinn will decide who will be the representative to meet with the nutritionist to discuss the campaign. Mabel Bridges sent out reports for contract days and will be glad to go over the reports with employees if they have any questions. Vocational Inservices for Classified - Continue to work with Mary Armstrong of ROP.
MEETING ADJOURNED	3:15 PM
NEXT MEETING	May 9, 1977

VIII. FACILITIES

THE FACILITIES SHOULD BE CONDUCIVE TO THE COMFORT AND ATTENTION OF THE GROUP.

- TASK-ORIENTED MEETINGS (PLANNING, PROBLEM-SOLVING, DECISION-MAKING, DATA GATHERING):
  - A. COMFORTABLE CHAIRS IN SEMI-CIRCLE. IF A LARGE GROUP, CONCENTRIC SEMI-CIRCLES WITH OPEN SPACE TOWARD THE RECORDER OR TABLES CLOSE TOGETHER FOR PARTICIPANTS TO GROUP AROUND. TRY TO ARRANGE IT SO THAT NO PARTICIPANT IS FARTHER THAN 25 FEED FROM ANY OTHER PARTICIPANT.
  - B. HAVE DOORS TO THE ROOM BEHIND THE GROUP IF POSSIBLE OR AT LEAST OFF TO THE SIDE.
  - C. KEEP GROUP FAIRLY CLOSE TO WALL WHERE RECORDER IS WRITING - NO MORE THAN 15 FEET IF POSSIBLE.
- INFORMATION GATHERING MEETINGS:
  - A. SAME AS TASK-ORIENTED MEETINGS BUT USE AUDIO-VISUAL AIDS, ETC. AS MUCH AS POSSIBLE.
  - B. MAKE CERTAIN ALL PARTICIPANTS CAN SEE AND HEAR CLEARLY.
- RAP SESSIONS:
  - A. COMFORTABLE CHAIRS IN FULL CIRCLE.
  - B. KEEP THE GROUP SMALL.
  - C. SUBDUED LIGHTING.
  - D. CARPETING ON THE FLOOR IF POSSIBLE.
  - E. REFRESHMENTS ON ONGOING BASIS FOR MAXIMUM INFORMALITY.

SUGGESTED FACILITY ARRANGEMENTS



FACILITATOR MOVES AROUND AS APPROPRIATE FOR EYE CONTACT AND EASE OF COMMUNICATION. RECORDER REMAINS CLOSE TO BUTCHER PAPER.

IX. ORGANIZATIONAL DECISION-MAKING

TYPE OF DECISION-MAKING	DESCRIPTION	APPLICATIONS
AUTOCRATIC DECISION-MAKING	THE DECISION-MAKER SOLVES THE PROBLEM OR MAKES THE DECISION USING INFORMATION AVAILABLE AT THE TIME	- IN EMERGENCY SITUATIONS WHERE THERE IS LITTLE OR NO TIME FOR INVOLVEMENT; E.G., FIRE OR ENEMY ATTACK - IN SITUATIONS WHERE A KNOWN, RESPECTED, AND ACKNOWLEDGED EXPERT MAKES THE DECISION; E.G., SURGEON
BENEVOLENT-AUTOCRATIC DECISION-MAKING	THE DECISION-MAKER OBTAINS THE NECESSARY INFORMATION FROM SUBORDINATES; THEN MAKES THE DECISION	- SAME AS AUTOCRATIC DECISION-MAKING BUT THE TIME CONSTRAINTS ARE NOT SO SEVERE - IN SITUATIONS WHERE SUBORDINATES MIGHT HAVE INFORMATION WHICH COULD AFFECT THE QUALITY OF THE DECISION AND THERE IS TIME TO OBTAIN THIS INPUT
CONSULTATIVE DECISION-MAKING	THE DECISION-MAKER SHARES THE PROBLEM WITH SUBORDINATES INDIVIDUALLY, OBTAINS THEIR IDEAS, AND MAKES THE DECISION OR THE DECISION-MAKER SHARES THE PROBLEM WITH SUBORDINATES AS A GROUP, OBTAINS THEIR IDEAS, AND MAKES THE DECISION	- IN SITUATIONS WHERE THE GROUP CONSISTS OF ANTAGONISTIC MEMBERS BUT THE DECISION-MAKER FEELS EACH INDIVIDUAL'S IDEA IS IMPORTANT TO THE QUALITY OF THE DECISION - IN SITUATIONS WHERE THE DECISION-MAKER IS ACCOUNTABLE FOR THE DECISION BUT PREFERS NOT TO SHARE THE DECISION-MAKING WITH THE GROUP FOR WHATEVER REASON; E.G., INCOMPETENT OR PREJUDICED SUBORDINATES

TYPE OF DECISION-MAKING	DESCRIPTION	APPLICATIONS
PARTICIPATIVE DECISION-MAKING	THE DECISION-MAKER SHARES THE PROBLEM WITH SUBORDINATES AS A GROUP AND ACCEPTS MAJORITY RULE AS THE DECISION OR	- IN SITUATIONS WHERE THERE IS INADEQUATE TIME TO OBTAIN CONSENSUS OR WHERE IT IS NOT IMPORTANT THAT A DISGRUNTLED MINORITY EXISTS
PARTICIPATIVE DECISION-MAKING	THE DECISION-MAKER SHARES THE PROBLEM WITH SUBORDINATES AS A GROUP AND ACHIEVES A CONSENSUS DECISION AS A GROUP OR THE DECISION-MAKER SHARES THE PROBLEM WITH SUBORDINATES AS A GROUP AND ACHIEVES A UNANIMOUS DECISION	- IN SITUATIONS WHERE IT IS ESSENTIAL THAT A COMMITMENT IS OBTAINED TO CARRY OUT THE DECISION OR WHERE IT IS IMPORTANT THAT THE DECISION IS OF A HIGH QUALITY - IN SITUATIONS WHERE MAXIMUM GROUP SYNERGY IS NECESSARY TO MAKE A HIGH-QUALITY DECISION WITH MAXIMUM GROUP COMMITMENT

QUALITY RESULTS IN DECISION-MAKING

(FORMULA)

QUALITY OF THE DECISION X DEGREE OF COMMITMENT = RESULTS

EXAMPLE: (SCALE OF 1 to 10)

HIGH QUALITY DECISION (10) X AVERAGE COMMITMENT (5) = AVERAGE RESULTS (50)

AVERAGE DECISION (5) X HIGH COMMITMENT (10) = AVERAGE RESULTS (50)

THE QUALITY OF THE DECISION IS ENHANCED WITH GOOD DATA AND INFORMED, CREATIVE, OPEN STAFF INVOLVEMENT.	THE QUALITY OF THE COMMITMENT IS INCREASED THROUGH HONEST, MEANINGFUL STAFF INVOLVEMENT.

X. DECISION-MAKING STYLES *

STYLE	ADVANTAGES	DISADVANTAGES
UNILATERAL (without input)	QUICK	NO INPUT; THEREFORE DECISION MAY NOT BE THE "BEST" SLOW IMPLEMENTATION CREATES POSSIBLE CONFLICT LITTLE COMMITMENT BY PARTICIPANTS SEEN TO BE "UNDEMOCRATIC"
UNILATERAL (with input)	QUICK DECISION QUALITY PROBABLY BETTER THAN WITHOUT INPUT	LITTLE INPUT SLOW IMPLEMENTATION LITTLE COMMITMENT BY PARTICIPANTS SEEN AS DEMOCRATIC FACADE
MAJORITY RULE	RATHER QUICK SEEN TO BE "DEMOCRATIC"	DEVISIVE (POLARIZES POSITIONS) MAY WASTE ASSETS OF MINORITY SLOW IMPLEMENTATION IF WHOLE GROUP IS NEEDED MINORITY MAY BE UPSET AND MAY TRY TO "SABOTAGE"
CONSENSUS	EVERYONE INVOLVED UTILIZES GROUP ASSETS AND RESOURCES SYNERGISTIC FORCE (THE TOTAL IS GREATER THAN THE SUM OF THE PARTS.) GROUP COMMITMENT TO SUCCESS IN IMPLEMENTING DECISION	TAKES TIME DOESN'T AVOID CONFRONTATIONS REQUIRES HIGH DEGREE OF SKILL ON PART OF FACILITATOR MAY NOT BE POSSIBLE IN SITUATIONS WHERE BASIC PRINCIPLES ARE DIAMETRICALLY OPPOSED
UNANIMITY	TOTAL COMMITMENT EVERYONE INVOLVED MAXIMUM UTILIZATION OF GROUP ASSETS AND RESOURCES TOTAL SYNERGISTIC FORCE	MIGHT BE UNATTAINABLE TIME CONSUMING TENDENCY TO OVERLOOK CONSTRAINTS

* Adapted from materials developed by Rich Gemmet, Coordinator, San Mateo County Schools Office, Redwood City, CA 94063

OF THE PROCEDURES INDICATED ON THE PREVIOUS PAGE, THE ONE WHICH GENERALLY RESULTS IN THE MOST SATISFACTION TO ALL CONCERNED AND PROVIDES FOR THE GREATEST COMMITMENT TO FOLLOWING THROUGH ON THE PLAN, DECISION, ETC. IS DECISION-MAKING BY CONSENSUS. SOME SUGGESTIONS ARE IN ORDER, HOWEVER, AS TO WHAT IS MEANT BY CONSENSUS AND HOW TO ACHIEVE IT.

- CONSENSUS DOES NOT NECESSARILY MEAN UNANIMITY; IT DOES MEAN STRIVING FOR A WIN/WIN SITUATION (BOTH PARTIES WIN) INSTEAD OF A WIN/LOSE SITUATION (ONE PART OF THE GROUP WINS, THE OTHER LOSES).
- WHEN IT APPEARS AN IMPASSE EXISTS, LOOK FOR ALTERNATIVES ACCEPTABLE TO BOTH GROUPS.
    - A. Find out what particular elements are causing the disagreement.
    - B. Strive for alternatives on these elements.

      Check the language used - Does it mean the same to both groups?
    - C. Are some words emotion-laden?
    - D. Are some reactions to particular people rather than to issues?
- AVOID TECHNIQUES SUCH AS MAJORITY VOTE WHICH MIGHT END THE IMPASSE BUT RESULT IN A WIN/LOSE SITUATION.
- CONSENSUS ATTAINMENT IS NOT COMPROMISE.
    - A. Compromise means both partners giving up on certain principles.
    - B. Consensus is finding alternatives generally-acceptable to both parties without either giving up cherished principles.
- WHEN DIFFERENCES OF OPINION ARE TAKEN INTO ACCOUNT IN WORKING OUT A CONSENSUS AGREEMENT, THE RESULT IS VIRTUALLY ALWAYS SUPERIOR TO THAT RESULT BASED ON ONE-SIDED OPINIONS ONLY.

XI. METHODS FOR BETTER MEETINGS

BUTCHER PAPER, CHART PADS, ETC.:

LARGE SHEETS OF PAPER ARE A BASIC TOOL OF GROUP WORK. FOCUSING ON THE CHART IMPOSES DISCIPLINE WITHOUT THE NEED TO GIVE ORDERS. THIS INCLUDES FLIP CHARTS OR PADS ON EASELS, OR SHEETS TAPED TO THE WALLS. EVERYTHING SIGNIFICANT THAT OCCURS DURING THE MEETING IS POSTED WHERE ALL CAN SEE. SHEETS THAT ARE USEFUL FOR FOLLOW-UP ACTIVITY ARE RETAINED; E.G., MINUTES.

USES

- DISPLAYING DATA THAT WERE COLLECTED BEFORE THE MEETING.
- BUILDING AND AGREEING UPON AN AGENDA.
- RECORDING SIGNIFICANT IDEAS OR ISSUES THAT OCCUR DURING THE MEETING.
- PRESENTING FACTS OR CONCEPTS.
- COMPILING ACTION LISTS.
- PLAYING WITH IDEAS.
- BRAINSTORMING RESULTS.

GOING AROUND THE ROOM:

THE PROCEDURE IS SIMPLY TO GO AROUND THE ROOM IN SEQUENCE AND ASK EACH PERSON TO STATE HIS/HER POSITION AS OF THAT MOMENT.

USES

- WHEN THE GROUP IS HUNG UP AROUND THE VIEWS OF THOSE WHO ARE DOMINATING THE CONVERSATION.
- WHEN THE GROUP SEEMS TO HAVE RUN OUT OF SOLUTIONS.
- TO TAKE A READING OF WHERE THE GROUP IS AT KEY POINTS IN A MEETING.
- AN EXCELLENT WAY TO WIND UP A MEETING.
- A "QUICK" EVALUATION OF THE MEETING.
- WHEN "PROCESS" NEEDS ARE AT A HIGH LEVEL.

CRITIQUING (EITHER AS PART OF GOING AROUND THE ROOM OR LESS STRUCTURED):

A CRITIQUE IS A COMMENT ON WHAT'S GOING ON. IT MAY OCCUR SPONTANEOUSLY:

"HOLD IT! WE'RE GOING TOO FAST!"

OR

"WAIT A MINUTE! WHEN ARE WE GONNA DO WHAT WE CAME HERE FOR?"

OR YOU CAN PLAN FOR THE CRITIQUE BY SETTING ASIDE A LITTLE TIME FOR THE PARTICIPANTS TO REFLECT ALOUD ON WHAT THEY'VE BEEN DOING.

USES

- ROUTINELY, AS A MEASUREMENT OF THE EFFECTIVENESS OF AN ACTIVITY.
- CRITIQUING IS ALSO A WAY OF INFUSING LIFE INTO TEDIOUS PROCEEDINGS, AND A COUNTER FOR PEOPLE WHO KEEP ASKING FOR MORE MEETINGS, WHEREAS YOU KNOW THERE ARE ALREADY TOO MANY.
- ACT AS CHECKPOINT DURING A LONG SESSION.

SUBGROUPING:

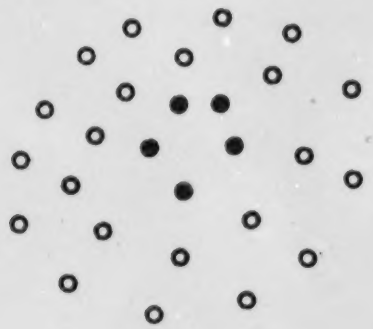
THE GROUP IS TEMPORARILY DIVIDED INTO SUBGROUPS OF TWO TO SIX PEOPLE. THE SUBGROUPS ARE ASSIGNED INDIVIDUAL TOPICS OR A COMMON DISCUSSION TOPIC. EACH SUBGROUP THEN SUMMARIZES ITS DISCUSSION TO THE REASSEMBLED TOTAL GROUP FOR REACTION AND CLARIFICATION.

USES

- A WAY OF COLLECTING INFORMATION ON CURRENT CONDITIONS WITHIN THE ORGANIZATION, OR DESIRED CHANGES.
- BUILDING AN AGENDA OR WORKING ON AGENDA ITEMS.
- A WAY OF MAKING PROGRESS WHEN THE TOTAL GROUP IS STUCK.
- SETTING PRIORITIES.
- DEVELOPING ROLES AND NON-ROLES OF NEWLY-APPOINTED COMMITTEES.

THE FISHBOWL:

THE ATTENDEES ARRANGE THEMSELVES IN CONCENTRIC CIRCLES. (NO PARTICIPANTS SHOULD BE FARTHER THAN 25' FROM ANY OTHER, IF POSSIBLE.)



THE PERSONS IN THE INNER CIRCLE (THE FISHBOWL) TAKE THE ACTIVE ROLE; THE OUTER CIRCLE CONSISTS OF OBSERVERS WHOSE TASK IS TO LISTEN AND WHO ARE RELATIVELY INACTIVE. ONE OR TWO EMPTY CHAIRS MAY BE INCLUDED IN THE INNER CIRCLE TO BE OCCUPIED BY OBSERVERS FOR SHORT PERIODS OF TIME.

USES

- TO DISSEMINATE INFORMATION FROM THE FISHBOWL GROUP TO A LARGER GROUP WHICH IS NOT DIRECTLY INVOLVED.
- TO ALLOW FOR A "FRIENDLY DISCUSSION" ON A MORE INTIMATE BASIS WHERE THE INNER CIRCLE PARTICIPANTS ARE REPRESENTATIVES OF OUTER CIRCLE OBSERVERS.
- TO PROVIDE FOR FEEDBACK AND INTERCHANGES OF INFORMATION WHICH CAN BEST BE ELICITED IN A SMALL GROUP SITUATION.

THREE BY FIVE CARDS:

EACH PARTICIPANT GIVEN SEVERAL 3" x 5" CARDS AT THE BEGINNING OF A MEETING.

USES

- PARTICIPANTS TO NOTE OWN IDEAS PRIOR TO DISCUSSION SO IDEAS WON'T BE LOST.
- QUICK EVALUATION - IDEAS PUT DOWN ON CARDS, COLLECTED AND USED AS EVALUATIVE DATA.

XII. EVALUATION

AT THE END OF EACH MEETING OR AT PERIODIC INTERVALS, A QUICK ASSESSMENT OF "HOW WELL DID WE DO IN REACHING OUR OBJECTIVE?" SHOULD BE TAKEN. PERIODICALLY, ANY GROUP WHICH MEETS FAIRLY REGULARLY (ONCE A MONTH OR MORE) SHOULD REVIEW ITS PROCEDURES, OBJECTIVES, ETC. TO MAKE CERTAIN SUCH MEETINGS ARE REALLY SERVING A USEFUL PURPOSE.

AN EVALUATION MIGHT BE SIMPLY GOING AROUND THE GROUP AND GETTING A SIMPLE SENTENCE EVALUATION FROM EACH MEMBER ORALLY OR ON A CARD OR IT MIGHT BE OBTAINING EACH INDIVIDUAL'S REACTION ON A QUESTIONNAIRE. A SAMPLE OF SUCH A QUESTIONNAIRE IS INCLUDED FOR YOUR USE. IF SUCH A SURVEY IS TAKEN, THE RESULTS SHOULD BE REPORTED BACK AND THE MEETING PROCEDURES MODIFIED TO ENHANCE THE OUTCOMES OF THE MEETINGS.

XIII. SUMMARY OF EFFECTIVE MEETING MANAGEMENT

- PLAN TO ACHIEVE A PURPOSE - NOT TO HOLD A MEETING.
- ADAPT THE AGENDA TO THE PURPOSE OF THE MEETING.
- INVITE ONLY PARTICIPANTS WHO ARE ESSENTIAL TO THE ACHIEVEMENT OF THE PURPOSE OF THE MEETING.
- OBTAIN PARTICIPANT INPUT TO THE AGENDA WHENEVER POSSIBLE AND CIRCULATE THE AGENDA AT LEAST 48 HOURS PRIOR TO THE MEETING.
- START ON TIME AND END ON TIME OR BEFORE.
- DO NOT TOLERATE LATE ATTENDANCE, INTERRUPTIONS, ETC.
- SET THE PRIORITY FOR THE MEETING.
- CHANGE YOUR LEADERSHIP STYLE TO FIT THE TYPE OF MEETING.
- ADAPT YOUR DECISION-MAKING METHOD TO FIT THE TYPE OF MEETING.
- DISTRIBUTE MINUTES WITHIN 48 HOURS OF THE MEETING.

XIV. APPLICATIONS

OBJECTIVE:

PARTICIPANTS TO EVALUATE THE TRAINING SESSION JUST COMPLETED AND TO PROVIDE SUGGESTIONS FOR IMPROVEMENT IN BOTH PROCESS AND MATERIALS.

PROCEDURE:

A. DIVIDE TOTAL GROUP INTO SUB-GROUPS OF APPROXIMATELY SIX PARTICIPANTS. EACH SUB-GROUP PRODUCES THREE LISTS:

   1. REACTIONS TO THE WORKSHOP.
   2. SUGGESTIONS FOR IMPROVEMENT IN PROCESS.
   3. SUGGESTIONS FOR IMPROVEMENT IN MATERIALS/CONTENT.

   EACH SUB-GROUP SELECTS A FACILITATOR AND A RECORDER FOR EACH OF THEIR LISTS, THEREBY GIVING ALL SIX PARTICIPANTS PRACTICE AS EITHER A RECORDER OR A FACILITATOR.

B. TOTAL GROUP REASSEMBLES AND EACH FACILITATOR OR RECORDER (OPTION) REPORTS OUT TO THE ENTIRE GROUP.

C. WORKSHOP DIRECTOR SELECTS SIX PARTICIPANTS: THREE TO FACILITATE AND THREE TO RECORD THE MAJOR THREADS FROM EACH OF THE THREE LISTS.

D. GENERAL DISCUSSION OF REACTIONS AND SUGGESTIONS.

OBJECTIVE:

PARTICIPANTS TO WORK THROUGH A GIVEN DECISION-MAKING PROBLEM AND REPORT THEIR CONCLUSIONS TO THE TOTAL GROUP.

PROCEDURE:

DIVIDE TOTAL GROUP INTO SUB-GROUPS OF APPROXIMATELY SIX PARTICIPANTS. EACH SUB-GROUP SELECT A FACILITATOR AND A RECORDER AND WORK THROUGH

ONE OF THE FOLLOWING PROBLEMS AS ASSIGNED BY THE WORKSHOP DIRECTOR:

A. FALLOUT SHELTER PROBLEM.

B. KIDNEY MACHINE PROBLEM.

OBJECTIVE:

PARTICIPANTS TO PROBLEM-SOLVE ONE OF SEVERAL PROBLEM SITUATIONS. (SEE NEXT PAGE)

PROCEDURE:

DIVIDE TOTAL GROUP INTO SUB-GROUPS OF APPROXIMATELY SIX PARTICIPANTS. EACH SUB-GROUP SELECT ONE OF THE ATTACHED PROBLEM SITUATIONS AND RESOLVE IT. THE PRODUCT OF EACH GROUP WILL BE A "WELL DEFINED" PROBLEM STATEMENT AND A SUGGESTED "FEASIBLE" SOLUTION. EACH SUB-GROUP WILL SELECT A FACILITATOR AND A RECORDER FOR THE SESSION.

PROBLEM SITUATIONS

SITUATION A:

YOU ARE A PLANNING GROUP SELECTED BY TOP MANAGEMENT TO PROVIDE MANAGEMENT TRAINING FOR ALL THE MANAGERS IN YOUR ORGANIZATION. YOUR MANAGEMENT GROUP IS A "MIXED BAG": SOME OLD TIMERS AND SOME NEW MEMBERS, SOME WITH MINIMAL MANAGEMENT TRAINING AND SEVERAL WITH EXTENSIVE TRAINING AND LONG EXPERIENCE, SOME ENTIRELY SATISIFED WITH THEIR OWN SKILLS AND OTHERS WHO REALLY SEE THE NEED TO IMPROVE PRESENT SKILLS AND DEVELOP NEW SKILLS FOR THESE RAPIDLY-CHANGING TIMES. YOUR MISSION IS TO DEVELOP A PROPOSED TRAINING PROGRAM WHICH WILL IMPROVE THE SKILLS OF ALL MANAGERS AND BE SEEN BY THEM AS PRODUCTIVE.

SITUATION B:

YOU ARE THE FACULTY IN A K-6 SCHOOL WHICH HAS BEEN NOTIFIED THAT, AS OF SEPTEMBER, IT WILL PROVIDE "ALTERNATIVE" PROGRAMS. THIS IS CONSTRUED TO MEAN THAT THERE WILL BE TEACHERS TEACHING TRADITIONAL CLASSES AND OTHERS TEACHING "OPEN EDUCATION" CLASSES. YOUR MISSION IS TO LAY OUT A PLAN TO PROVIDE THESE ALTERNATIVE PROGRAMS.

SITUATION C:

YOU ARE THE PRINCIPAL'S CABINET IN A HIGH SCHOOL WHICH HAS HAD VERY SUCCESSFUL INTER-SCHOLASTIC ATHLETIC TEAMS FOR BOYS. YOU HAVE NOW BEEN INFORMED THAT BEGINNING IN SEPTEMBER YOU WILL FIELD TEAMS IN GIRLS' INTER-SCHOLASTIC ATHLETICS INVOLVING AS MANY GIRLS AS BOYS AND WITH NO INCREASE IN THE TOTAL ATHLETIC BUDGET. YOUR MISSION IS TO LAY OUT A PLAN TO ACCOMPLISH THIS.

XV. B I B L I O G R A P H Y

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APPENDIX

MEETINGS

YOU WILL PROBABLY AGREE THAT SCHOOL SYSTEMS HOLD A LOT OF MEETINGS, SUCH AS FACULTY MEETINGS, COMMITTEES, ADMINISTRATIVE STAFF MEETINGS, BOARD SESSIONS, DEPARTMENT MEETINGS AND THE LIKE.

WE ARE ASKING YOU TO FOCUS ON THE _____ MEETING.

NOW PLEASE CONSIDER WHAT USUALLY OR TYPICALLY HAPPENS IN THIS MEETING. FOR EACH OF THE ITEMS BELOW, PLEASE CIRCLE THE APPROPRIATE NUMBER.

		ALMOST ALWAYS	OFTEN	SOME-TIMES	SELDOM	ALMOST NEVER
1.	When problems come up in the meeting, they are thoroughly explored until everyone understands what the problem is.	1	2	3	4	5
2.	The first solution proposed is often accepted by the group.	1	2	3	4	5
3.	People come to the meeting not knowing what is to be presented or discussed.	1	2	3	4	5
4.	People ask why the problem exists; what the causes are.	1	2	3	4	5
5.	There are many problems which people are concerned about which never get on the agenda.	1	2	3	4	5
6.	There is a tendency to propose answers without really having thought the problem and its causes through carefully.	1	2	3	4	5
7.	The group discusses the pros and cons of several different alternate solutions to a problem.	1	2	3	4	5
8.	People bring up extraneous or irrelevant matters.	1	2	3	4	5
9.	The average person in the meeting feels that his ideas have gotten into the discussion.	1	2	3	4	5

		ALMOST ALWAYS	OFTEN	SOME-TIMES	SELDOM	ALMOST NEVER
10.	Someone summarizes progress from time to time.	1	2	3	4	5
11.	Decisions are often left vague--as to what they are, and who will carry them out.	1	2	3	4	5
12.	Either before the meeting or at its beginning, any group member can easily get items onto the agenda.	1	2	3	4	5
13.	People are afraid to be openly critical or make good objections.	1	2	3	4	5
14.	The group discusses and evaluates how decisions from previous meetings worked out.	1	2	3	4	5
15.	People do not take the time to really study or define the problem they are working on.	1	2	3	4	5
16.	The same few people seem to do most of the talking during the meeting.	1	2	3	4	5
17.	People hesitate to give their true feelings about problems which are discussed.	1	2	3	4	5
18.	When a decision is made, it is clear who should carry it out, and when.	1	2	3	4	5
19.	There is a good deal of jumping from topic to topic--it's often unclear where the group is on the agenda.	1	2	3	4	5
20.	From time to time in the meeting, people openly discuss the feelings and working relationships in the group.	1	2	3	4	5
21.	The same problems seem to keep coming up over and over again from meeting to meeting.	1	2	3	4	5

		ALMOST ALWAYS	OFTEN	SOME-TIMES	SELDOM	ALMOST NEVER
22.	People don't seem to care about the meeting, or want to get involved in it.	1	2	3	4	5
23.	When the group is thinking about a problem, at least two or three different solutions are suggested.	1	2	3	4	5
24.	When there is disagreement, it tends to be smoothed over or avoided.	1	2	3	4	5
25.	Some very creative solutions come out of this group.	1	2	3	4	5
26.	Many people remain silent.	1	2	3	4	5
27.	When conflicts over decisions come up, the group does not avoid them, but really stays with the conflict and works it through.	1	2	3	4	5
28.	The results of the group's work are not worth the time it takes.	1	2	3	4	5
29.	People give their real feelings about what is happening during the meeting itself.	1	2	3	4	5
30.	People feel very committed to carrying out the solutions arrived at by the group.	1	2	3	4	5
31.	When the group is supposedly working on a problem, it is really working on some other "under the table" problem.	1	2	3	4	5
32.	People feel antagonistic or negative during the meeting.	1	2	3	4	5
33.	There is no follow-up of how decisions reached at earlier meetings worked out in practice.	1	2	3	4	5
34.	Solutions and decisions are in accord with the chairman's or leader's point of view, but not necessarily with the members.	1	2	3	4	5

	ALMOST ALWAYS	OFTEN	SOME-TIMES	SELDOM	ALMOST NEVER
35. There are splits or deadlocks between factions or sub-groups.	1	2	3	4	5
36. The discussion goes on and on without any decision being reached.	1	2	3	4	5
37. People feel satisfied or positive during the meeting.	1	2	3	4	5

MEETINGS VARY ACCORDING TO THEIR PRIMARY FOCUS OF ATTENTION. THEY MAY BE MAINLY FOCUSED ON "INFORMATION-GIVING"--ANNOUNCEMENTS, EXPLAINING PLANS OR RULES, DEALING WITH ROUTINE MATTERS. OR THEY MAY BE MAINLY FOCUSED ON "PROBLEM-SOLVING" --DISCUSSION AND DECISION, WORKING OUT ANSWERS TO PROBLEMS ON THE SPOT.

38. Thinking now of the meeting you have been describing, check the appropriate phrase. Most of the time is spent on ...

____ Information-Giving _____ Problem-Solving

39. Now, still thinking of this meeting, where SHOULD most of the time be spent? Check one ...

_____ Information-Giving _____ Problem-Solving

NTL Learning Resources Corporation, Fairfax, VA 22030, DIAGNOSING PROFESSIONAL CLIMATES OF SCHOOLS, Fox, Robert; Schmuck, Richard et al, 1973, 152 pages

NOTE: This questionnaire was formulated first as part of the Cooperative Project on Educational Development. It was published as part of Chapter 6 of HANDBOOK OF ORGANIZATION DEVELOPMENT IN SCHOOLS, Richard Schmuck and Philip Runkel, National Press Books, 1972 and was expanded to 39 items on pages 74-78 in DIAGNOSING THE PROFESSIONAL CLIMATE OF SCHOOLS, Robert S. Fox et al, NTL Learning Resources Corp., Fairfax, VA, 1975